



Inviting Users and Assigning Access



Using Campaign Targeter, account administrators can invite new users or add existing users to their accounts or sub-accounts, and easily manage user access levels.



Inviting new users

1. Login to Campaign Targeter.
2. Select "Users" from the dashboard menu.

If you have multiple accounts and sub-accounts, make sure the appropriate account is selected first.

The screenshot shows the Campaign Targeter dashboard. On the left, a sidebar menu has 'Users' highlighted with a red background and a white user icon. Above the menu, there are two tabs: 'Customer' and 'Sub-Accounts'. The 'Customer' tab is active, showing a dropdown menu with 'Friendly Food Mart' selected. Below the dropdown, there are several menu items: 'Campaigns', 'Bookings', 'Catchment Sets', 'Sub-Accounts', 'Users' (highlighted), and 'Customer Details'. A callout box points to the 'Users' menu item with the text: 'If you have multiple accounts and sub-accounts, make sure the appropriate account is selected first.'



3. Select "Create New User".

The screenshot shows a red button with the text 'Create new User' in white. A mouse cursor is pointing at the button.

4. Enter the new user's name and email address into the fields provided.
5. If you would like the new user to have administrator access, tick the "Admin User" checkbox.
6. Select "Send Invite".

The screenshot shows a form titled 'Invite a new or existing user to Janes Florist'. It has two main sections: 'User's Name' and 'User's Email Address'. The 'User's Name' field contains 'Peter Jones'. The 'User's Email Address' field contains 'peter.jones.flowers@gmail.com'. Below these fields is a checkbox labeled 'Admin User?' which is currently unchecked. At the bottom of the form is a red button labeled 'Send Invite'. Numbered steps 4, 5, and 6 are overlaid on the form: step 4 points to the name field, step 5 points to the email field, and step 6 points to the 'Send Invite' button.

Note: When adding users, you can assign either administrator, or user level access. Administrators can perform all functions and modify account settings, whereas a user only has access to create campaigns.



An email will be sent to the new user inviting them to confirm their registration. You will be taken to the "Manage Users" screen where you can add a mobile phone number for the new user and further configure their level of access.

The screenshot shows an email invitation from Campaign Targeter. The email is addressed to 'noreply@email.campaigntargeter.com.au' and is titled 'to me'. The body of the email says: 'Hi Peter Jones, Welcome to Campaign Targeter! You have been invited to register under the account 'Janes Florist'. Please click on the link in <https://mtmpost.roymorgan.com/register?token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpZiVVG9rZW4iOiRydWUslmV4cGlyZXMiOiJlMTd1MTg5MTd9QkagnR0iOi58aMRt71N>. This link will expire within 72 hours from the date and time sent. If the link expires, please res...



Assigning access

Assign access to all sub-accounts either as a user, or an administrator and select “Save”.

Note: If you would like to only assign access to specific sub-accounts, disable these options.



Access all stores for Janes Florist



Is an administrator? (for ALL sub-accounts)

Save



Assign user access to selected sub-accounts

1. Select the “Sub-Accounts” tab.
2. Select “Assign”.
3. Choose a sub-account from the drop-down list.
4. Select “Add”.

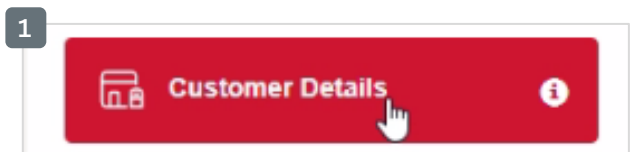


To assign administrator access to the sub-account, activate the corresponding “Administrator” switch. Repeat this process to assign access to additional sub-accounts.



Removing users

1. From the dashboard, select “Customer Details”.
2. Select the “Users” tab to display a list of all users assigned to this account.
3. Find the user that you would like to remove and select the corresponding “Remove” button.



Note: When removed, the user will no longer have access to this account or any of the associated sub-accounts.



For more helpful information and to register, visit: auspost.com.au/campaigntargeter